

dotProject Version 2.0.2 Basic User Manual

Section 3: Project Information and Tasks De Bortoli Wines

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Main Project Elements

The main project elements you need to establish are firstly the project itself and then the tasks associated with that project. This manual section discusses both of these elements.

Basic Project Information

Each project has a basic set of project “header” information that is established before Tasks (or the actual jobs to be done to deliver the project) are added. As many of the elements here and in Tasks themselves are important to how you establish your project we will go into detail on them a little more than we have in other parts of this manual.

The screenshot shows the dotProject 2.0.1 software interface. At the top, there's a menu bar with File, Edit, View, Go, Bookmarks, Tools, and Help. Below the menu is a toolbar with a puzzle piece icon labeled "View Project", a search bar, and buttons for "new task" and "new file". The main content area is titled "Timesheet Development". It's divided into several sections: "Details" (Company: John Smith and Partners, Short Name: Timesheet, Start Date: 07/06/2005, Target End Date: 31/08/2005, Actual End Date: 29/07/2005, Target Budget: \$300.00, Project Owner: Project Manager, URL: internal.timesheet, Staging URL: testing.timesheet); "Summary" (Status: In Planning, Priority: high, Type: Unknown, Progress: 0.0%, Active: Yes, Worked Hours:, Scheduled Hours: 7, Project Hours: 14); "Departments" (Finance Department, Human Resources Department); "Contacts" (a table with one row for Mary Smith, email msmith@jsmith.com.au); and "Description" (a text box stating the project involves developing a timesheet application). Below the main content is a tabbed section with "Tasks" selected, showing a table of tasks with columns for Task Name, Task Creator, Assigned Users, Start Date, Duration, Finish Date, and Last Update. The table includes a header row with icons for Pin, New Log, Work, P, Task Name, Task Creator, Assigned Users, Start Date, Duration, Finish Date, and Last Update. A key at the bottom explains symbols for Future Task, Started and on time, Should have started, Overdue, Late, and Done. The footer of the interface includes a "Done" button and a message about page generation times.

The main Project Detail display is effectively broken into two halves – the Details and the Tabbed section.

The top half of the screen is then broken down into two columns, multiple sections. Much of the information displayed on this screen is entered via the Project Add / Edit screen, but some of the details are calculated. We'll discuss the calculated items here and go through the details of what to enter below in Creating a Project Header.

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Project Name / Colour Coding	You'll notice that the line at the top of the Details display includes the name of the project and is automatically coloured.
Actual End Date	This date is calculated from the latest expected end date from all the tasks associated with the project. In other words, despite the Target End Date entered against the project – this date is reflecting the End Date that the work is currently calculated to be completed by. If the Actual End Date is later than the targeted end date it will automatically be displayed in RED / BOLD .
Progress	This field will show a % complete calculation for the project as a whole based on the % complete of all the tasks associated with that project.
Worked Hours	This display is automatically calculated from the total number of hours recorded against this project in task logs. (In other words the actual hours work so far).
Scheduled Hours	This display shows the total number of hours recorded in the durations of all the tasks associated with the project. (In other words the expected total hours (not taking resource allocation into account) required to complete the project).
Project Hours	This display shows the Scheduled hours multiplied by the Task Assignments (eg if a task is set to 2 hours duration, but has 4 people assigned to it at 100% of their time then the actual number of hours in total for the task is 8).

Currently Project Hours should be regarded as indicative only as multiple resource handling and resource working calendars etc. are planned for the next dotProject major release set.

You will also notice a set of tabs at the bottom of the display. These tabs provide access to a range of information associated with the project such as Tasks, Inactive Tasks, Forums, a Gantt Chart showing the project in a visual layout, Task Logs associated with the entire project and so on.

	Depending upon the modules that are active, and whether there is any related data in those modules the tab listing may change. For example, if the links module is in use and there are links associated with this project, then a tab "Links" will be displayed. If the Help Desk module (for ad hoc task management) is enabled, again there could be a tab called "Help Desk" if any of the issues in that database have been linked to this project.
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Creating a Project Header

You can generate projects from:

- - New Item - > Project
- Project Module > new project button on the right hand side

The screenshot shows the 'New Project' form within the dotProject 2.0.1 application. The form includes fields for Project Name, Project Owner, Company, Start Date, Target Finish Date, Target Budget \$, Actual Finish Date (calculated), Actual Budget \$, URL, and Staging URL. On the right side, there are fields for Priority, Short Name, Color Identifier, Project Type, Status (Not Defined), Progress (0.0%), Active? (checked), Import tasks from (none), and a large Description area. At the bottom left are 'cancel' and 'submit' buttons, and a note that asterisks indicate required fields. A 'Done' button is at the bottom right.

Project Name	This is the name that is displayed in the majority of locations within dotProject to identify the project (see Short Name below as well). You should try to give the Project a name that will guide your team members about the requirements and distinguish this project from any others in your system.
Project Owner	This field automatically defaults to the person entering the Project Information. The owner of the project is automatically set in many of the display filters throughout dotProject and whilst being the owner does have limited effect in terms of permissions, it has a major effect in terms of accessing the project quickly (in dotProject terms) and ultimately in a business sense, indicates who is responsible for managing the project.

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Company	This field is used to nominate the company to which this project is attached.
Start Date	The expected start date of the project. Tasks can still be entered that commence before this date if required.
Target Finish Date	The expected or target finish date of the project. The detailed project display will also show the actual finish date as mentioned earlier.
Target Budget	This field is not used in any dotProject calculations or reports, but you can use it to store / record the project target budget.
Actual Finish Date	As mentioned above, the Actual Finish date is automatically calculated.
Actual Budget	This field is not used in any dotProject calculations or reports, but can be used to store the final project budget for future reference if required.
URL and Staging URL	These fields can be used to store any web addresses that are appropriate for the project. You may choose to use them for recording supporting sites, documentation related to the project, the company specifications or similar.
Select contacts	Contacts are users who can be recorded against the project, by way of having an “interest” in the project as opposed to users who are actually allocated tasks to do within the project’s workloads. These project contacts can then optionally receive updates of statuses as we will outline in Day to Day System usage later in this manual.
Select department	Projects can be assigned to departments within the nominated owning Company. This can give you a better differentiation of project ownership and relationships if you require it.
Priority	This field is used to indicate the priority assigned to a project. The priority displays throughout dotProject in displays (normally with a flag in the P column). The priority options can be set to suit your own organisation, by your own system administrator but they are dotProject installation wide – not definable by company, user etc.
Short Name	This field is used instead of the full project name in some locations throughout dotProject where real-estate or room is at a premium. dotProject will generate a default short name based on the starting characters of the full project name you entered, but you should perhaps adjust that to something that will be meaningful when seen.

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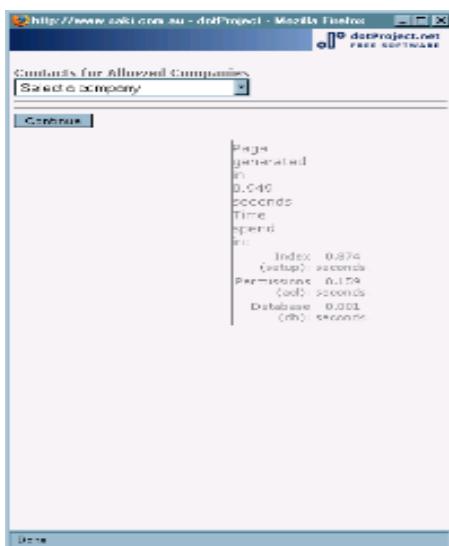
Color Identifier	Colours are used throughout dotProject in displays to quickly identify projects. You can use those colours to provide a visual indicator to your team members as suits you. Some people use colours to define the “type” of project, some use them to provide a quick visual indicator of the Company / area that the work is being performed for. Whichever way you choose to use colours, you can use the color identifier option to pop up a display which will show you the available colours or you can enter the 6 character RGB code for the colour.
Project Type	The project type is another category or grouping option for projects. At the moment no tabs use Project type nor are there any particular reporting requirements on the field, but it may be of some use. As with most of these drop down options, your System Administrator can customise the list to suit your own requirements.
Status	The Status field does have a direct bearing on dotProject as the tabs on the main project listing are derived from the status options that you are using. (Your System administrator again can tailor these to suit your own requirements if necessary). You use the status flag to indicate where the project is currently up to, and that has a direct relationship with which tab it is listed on on the main module page.
Progress	The % progress field will show the % complete of the entire project, based on the % complete of all the tasks associated with the project.
Active	<p>The active flag stipulates whether or not the project is Active or Archived.</p> <ul style="list-style-type: none">➤ Ticked on and the project is active. Tasks from this project will automatically be included in all todo and today listings.➤ If turned off (ticked off) then the project is regarded as archived and tasks will only be shown if the option is selected at the top of the today and todo listings.
Import tasks from	This option allows you to import (copy) tasks from another project directly into this one at the time that the project header is saved. For more details see below.
Description	This field should be used to provide a detailed description / summary of the project for the team members to use to acquaint themselves with the requirements.

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Selecting Project Contacts

Project contacts can be added to any project, regardless of the project owner and/or assigned Company. To attach a contact to a project, from the Project Add/Edit screen you can click on the button > Select contact. A pop up listing of contacts / companies is provided for you to select from.



You can adjust the required company by using the pull down box at the top of the screen. Select the required contact by placing a tick in the box beside their name. Once you have nominated all the required contacts to be attached to the project, use the continue box to return to the main screen.



Currently assigned contacts cannot be seen until the project is saved and the Project Detail screen displayed. The project contacts will then be listed in the left hand column on the screen.

Selecting a Department

Selecting a department is similar to selecting a company except that there is a variation between creating a new project and editing an existing project.

In the case of creating a new project, once you have selected the company that the project is to be associated with, there is an option > Select department which, when clicked on will display a popup box of available company departments and you can click on the required one to select. Again you will not see that selection until you save the project and look at the Detailed display.

When editing an existing project you will see that there will be a listing box on the screen in place of the Select department link which shows all the departments for the associated company and you can highlight (hold the CTRL key down when clicking on multiple selections if required) to nominate the associated department.

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Importing Tasks

Importing tasks allows you to copy (or move in some cases) task from one project to another. You can do this from the Project Add / Edit Screen, from View Project Detail Screen > Organize Tasks and in a very limited way from the Task Add/Edit screen as well.

Prior to dotProject version 2.0.2 we purposely did not carry user assignments and dates forward when copying tasks between projects. As of dotProject version 2.0.2 you will be able to optionally nominate if you want to copy assignments in.

Dates are imported as is across from the previous project. As a result of that they are imported in relation to the start date of the project. If the tasks imported had start dates, for example, 5 days from the start date of the original project, then they will be imported into the new project 5 days from its intended starting date. Again, dates are imported as an accident of history more than anything else and ideally we're considering changing this so that no dates are imported, on the basis again, that the automatic generation of dates on import has the potential for a project to be incorrectly scheduled. Durations on the other hand are imported working on the assumption that if you have a template of tasks then the chances are that the durations can be carried forward, ideally these should be reconsidered at the same time as the dates are recalculated.

Import Tasks via Project Add/Edit Screen

Importing tasks from the main project Add / Edit screen allows you to select a project from which all tasks will be copied into your current project automatically as the project header is saved.

To do this all you need to do is select the source project from the drop-down list. Once you save the project, the tasks will be copied in automatically. You can also repeat this option if you want to call in more sets of the same tasks by editing the project and selecting a source project before saving the original project again.

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Organize Tasks

The organize tasks option is available from View Project Details > Organize Tasks. This facility has been designed as a type of "task clipboard" - designed as a management location for controlling tasks from within one particular project at a time.

The screenshot shows a web-based application window titled 'Saki Support 2.0-alpha'. The main title bar includes the 'dotProject.net FREE SOFTWARE' logo. The menu bar contains links like Calendar, Tasks, Help Desk, Resources, Projects, Files, Contacts, Tickets, Forums, Companies, Departments, Help, SmartSearch, Reports, New Item, Help, My Info, Todo, Today, and Logout. The main content area is titled 'Organize Tasks' and displays a table of tasks:

Progress	Task	Duration	Due In	Select
0%	Task Introduction	5 hours	-12	<input type="checkbox"/>
10%	Another Task	5 hours	-5	<input type="checkbox"/>
0%	Task Four	1 hours	-5	<input type="checkbox"/>
0%	One Two Three	5 hours	5	<input type="checkbox"/>
0%	Sub-Task of One Two Three	5 hours	5	<input type="checkbox"/>
0%	Task Six	1 hours	12	<input type="checkbox"/>

Below the table are buttons for 'Action:', 'Project:', and 'Task:', along with a 'update selected tasks' button. A key legend at the bottom defines colors: light green for Future Task, light yellow for Started and on time, yellow for Should have started, red for Overdue, and grey for Unknown.

This display shows a list of all the tasks that are associated with your current project. We have purposely not included the collapsible view options as the assumption is that you are considering all tasks within the project. The pertinent options within the clipboard are:

Select Boxes	To the right hand side of each task name, select boxes are used for you to mark which tasks you then wish to perform the selected "Action" on.
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Actions	<p>The action box at the bottom of the screen provides you with a range of options to perform. This currently includes:</p> <ul style="list-style-type: none">➤ Delete - to remove the marked tasks;➤ Mark as Finished - sets the % complete of the marked tasks to 100;➤ Set Priority - sets the priority of the marked tasks to high / normal or low as selected;➤ Move - the marked tasks to another project or parent (removing them from the original location);➤ Copy – the marked tasks to another project or parent (leaving a copy at the original location).
---------	--

The Project box is then used to nominate the project to which tasks can be moved. This is currently limited to projects that the current user has access / permission to see and use.

The Task Box is used to nominate the task that will become the parent of all the tasks that are moved - this allows you to move a group of tasks into a parent task either in the destination project or within the current project if you require.

Once you have selected the options required the Update Selected Tasks button is used to initiate the action you have established.

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Move Task from Task Edit Screen

Moving a task from within the task module is actually a very simple operation and whilst technically it is part of the Task Edit function, we will include it here in the manual to keep all like functions in the one place and therefore easier to find.

When you edit a task you will notice that there is a move option at the bottom of the main Default tab:

The screenshot shows the 'Edit Task' window with the following details:

- Project:** Demo Project
- Task Name:** Task One
- Status:** Active
- Priority:** normal
- Progress:** 0%
- Milestone?**:

* indicates required field

tabbed : flat

Details | Dates | Dependencies | Human Resources | Other resources

Task Owner: User_Example

Access: Public

Web Address:

Task Parent: MY PARENT

Move this task (and its children), to project: Demo Project

Description:

Cancel | Save

If you select the destination project for this task from the drop-down, the task will be immediately moved to that new project as soon as you complete the action.

Gantt Charts

Gantt Charts are commonly used graphical representations of projects, showing tasks durations as horizontal lines indicating starting and ending times as well as providing details such as assigned resources etc.

dotProject provides a series of Gantt Chart views of projects. Looking at a Gantt Chart via the Gantt Tab on the Project Detail view, for example, will give you the chart for that particular project.

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dotProject - Mozilla Firefox

File Edit View Go Bookmarks Tools Help

projects list : edit this project : organize tasks : reports

delete project

Timesheet Development

Details

Company: John Smith and Partners
Short Name: Timesheet
Start Date: 07/06/2005
Target End Date: 31/08/2005
Actual End Date: 29/07/2005
Target Budget: \$300.00
Project Owner: Project Manager
URL: internal.timesheet
Staging URL: testing.timesheet

Description

This project involves the development of a timesheet application as per the specification document which is attached.

Please refer to the Project Initiation Document also attached for details of the project and its required outcomes.

Procedures for Project Management Requirements will be distributed as the project commences.

Summary

Status: In Planning
Priority: high
Type: Unknown
Progress: 0.0%
Active: Yes
Worked Hours:
Scheduled Hours: 7
Project Hours: 14

Departments

Finance Department
Human Resources Department

Contacts

Name	Email	Phone	Department
Mary Smith	msmith@jsmith.com.au		

tabbed : flat

Tasks | Tasks (Inactive) | Forums | Gantt Chart | Task Logs | Files |

From: 05/07/2005 To: 25/08/2005 Show captions Show work instead of duration submit show this month : show full project

Gantt Chart

Timesheet Development				2005												
Task name	Dur.	Start	Finish	Jul		Aug		Sep		Oct		Nov		Dec		
				4/7	11/7	18/7	25/7	1/8	8/8	15/8	22/8	29/8	5/9	12/9	19/9	26/9
Timesheet Access and Permissions	7 h	20/07/2005	29/07/2005													
Create Access Crumb and Module Ca.	2 h	20/07/2005	25/07/2005													
Creating the Permissions Model	5 h	26/07/2005	29/07/2005													

Today

Done

If you were to select the Gantt tab on the main project display however, it will list all active projects.

Projects

tabbed : flat

All Projects (2) | Proposed (0) | In Planning (1) | In Progress (0) | On Hold (0) | Complete (0) | Template (0) | Archived (0) | Not Defined (1) | Gantt |

From: 01/06/2005 To: 29/07/2005 All Projects Show captions Show Inactive Show Tasks submit show this month : show all

Gantt Chart

All Projects				2005												
				Jun				Jul				Aug				
Project name	Start Date	Finish	Actual End	30/5	6/6	13/6	20/6	27/6	4/7	11/7	18/7	25/7	1/8	8/8	15/8	22/8
Demo Project	05/10/2004	00/00/0000	25/05/2005													
Example Project	20/08/2004	00/00/0000	00/00/0000													

Today

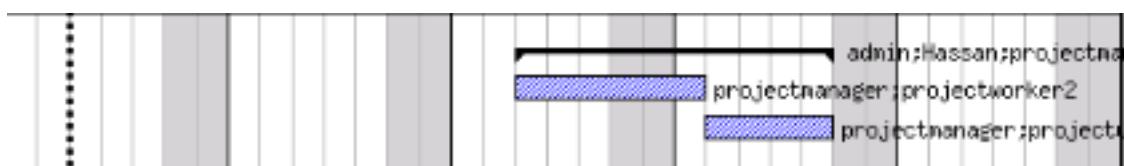
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All Gantt chart displays have options that allow you to configure the display / details incorporated in the Gantt chart. For example, turning on the All Projects, Show Tasks Option has expanded the Gantt chart from the display above to the more detailed display below.

The screenshot shows the dotProject 2.0.1 software interface. At the top, there's a menu bar with File, Edit, View, Go, Bookmarks, Tools, and Help. Below the menu is a toolbar with icons for New Item, Projects, Tasks, Calendar, Files, Contacts, Forums, Resources, Tickets, User Admin, and System Admin. The main title bar says "dotProject - Mozilla Firefox". In the center, there's a "Projects" section with a "Welcome" message. On the right, there's a "Company/Division: All" dropdown and a "new project" button. Below the title bar, there's a navigation bar with tabs for All Projects (1), Proposed (0), In Planning (1), In Progress (0), On Hold (0), Complete (0), Template (0), Archived (0), Not Defined (0), and Gantt. The "Gantt" tab is selected. Underneath, there are date filters: From: 04/07/2005, To: 04/08/2005, and a dropdown for "All Projects". There are also checkboxes for "Show captions", "Show Inactive", and "Show Tasks", with "Show Tasks" checked. A "submit" button is next to the checkboxes. Below these filters, there's a link "show this month : show all". The main area contains two tables. The left table, titled "All Projects", lists several projects with their names, start dates, finish dates, and actual end dates. The right table is a Gantt chart for June and July 2005. It shows tasks as horizontal bars. A red bar starts on June 6 and ends on June 20. A purple bar starts on June 27 and ends on July 4. A dotted vertical line marks the current date. At the bottom of the Gantt chart, there's a "Today" indicator. At the very bottom of the interface, there's a status bar with "Page generated in 0.068 seconds", "Time spent in:", and "Index (setup): 0.031 seconds".

You can also turn on captions to see more detail of the task assignees:



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Setting Up / Assigning Tasks

Tasks are the work elements that are required to make up or deliver the project as a whole. Defining tasks is partially a dotProject job (in entering and structuring them) and partially a matter of planning and designing your project.

Task Groups

Before we get into the detail of creating tasks a quick explanation of task groupings may help. Task groupings can help in managing large lists of tasks or in creating small sub-projects within a project that can be monitored in their own right. Tasks are grouped under parent tasks – with the sub-tasks being known as children or child tasks. For example:

The screenshot shows the dotProject application interface. At the top, there's a navigation bar with links like File, Edit, View, Go, Bookmarks, Tools, Help, and several project-related tabs. Below the navigation is a search bar and buttons for 'new task' and 'new file'. The main content area has a title 'Timesheet Development'. It's divided into sections: 'Details' (Company: John Smith and Partners, Short Name: Timesheet, Start Date: 07/06/2005, Target End Date: 31/08/2005, Actual End Date: 30/06/2005, Target Budget: \$3.00, Project Owner: Project Manager, URL: internal.timesheet, Staging URL: testing.timesheet), 'Summary' (Status: In Planning, Priority: normal, Type: Unknown, Progress: 0.0%, Active: Yes, Worked Hours: 0, Scheduled Hours: 7, Project Hours: 14), and 'Contacts' (a table with one row for Mary Smith). A 'Description' section contains a note about the project involving a timesheet application and a link to a specification document. Below the main content is a tabbed navigation bar with 'Tasks' selected, followed by 'Tasks (Inactive)', 'Forums', 'Gantt Chart', 'Task Logs', and 'Files'. A table below shows task details: Task Name (Timesheet Access and Permissions, Creating the Permissions Model, Create Access Crumb and Module Calls), Task Creator (projectmanager), Assigned Users (admin (100%) (+5), projectmanager (100%) (+1), projectmanager (100%)), Start Date (20/06/2005 09:00 am, 20/06/2005 09:00 am, 30/06/2005 05:00 pm), Duration (7 hours, 5 hours, 2 hours), Finish Date (30/06/2005 05:00 pm, 20/06/2005 02:00 pm, 30/06/2005 05:00 pm), and Last Update (-, -, -). A legend at the bottom explains task status colors: white for Future Task, yellow for Started and on time, red for Should have started, dark red for Overdue, and green for Done. The bottom left shows a 'Done' button.

When collapsed this parent / child combination would appear as follows:

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The screenshot shows the dotProject web interface. At the top, there's a navigation bar with links for File, Edit, View, Go, Bookmarks, Tools, Help, and a logo for 'dotProject.net FREE SOFTWARE'. Below the navigation is a menu bar with Companies, Projects, Tasks, Calendar, Files, Contacts, Forums, Tickets, User Admin, System Admin, and a 'New Item' dropdown. A welcome message 'Welcome Project Manager' is displayed. On the right side of the header are links for Help, My Info, Todo, Today, and Logout.

The main content area has a title 'View Project' with a puzzle piece icon. Below it are links for projects list, edit this project, move/copy tasks, and reports. There's also a search bar, a 'new task' button, a 'new file' button, and a 'delete project' link.

The main content is divided into sections: 'Timesheet Development', 'Details', 'Summary', 'Description', 'Contacts', and a 'Tasks' tabbed section. The 'Details' section contains project information like Company (John Smith and Partners), Short Name (Timesheet), Start Date (07/06/2005), Target End Date (31/08/2005), Actual End Date (20/06/2005), Target Budget (\$3.00), Project Owner (Project Manager), URL (internal.timesheet), and Staging URL (testing.timesheet). The 'Summary' section shows Status (In Planning), Priority (normal), Type (Unknown), Progress (0.0%), Active (Yes), Worked Hours, Scheduled Hours (5), and Project Hours (10). The 'Description' section includes a note about the development of a timesheet application and a reference to the Project Initiation Document. The 'Contacts' section lists Mary Smith with email msmith@jsmith.com.au and phone 0. The 'Tasks' section shows a table with columns: Pin, New Log, Work, Task Name, Task Creator, Assigned Users, Start Date, Duration, Finish Date, and Last Update. One task is listed: 'Timesheet Access and Permissions' by projectmanager, assigned to admin (100%) at 20/06/2005 09:00 am, duration 5 hours, finish date 20/06/2005 02:00 pm. A key at the bottom defines symbols: blue square =Future Task, yellow square =Started and on time, orange square =Should have started, red square =Overdue, green square =Done. A 'Show' checkbox for incomplete tasks is checked.

Done

Task Parents

There are two different types of parent tasks.

	Parent Task
	A parent task is displayed in normal text, with the Collapse / Expand symbols beside it. A parent task is still an active task in its own right. It has an expected duration and it's own start and finish date. You can record task logs against a parent task.
	Dynamic Task
	A dynamic task is displayed in bold and italics with the Collapse / Expand symbols beside it. A dynamic task is not an active task in its own right. It inherits its duration and start and finish dates from the child tasks associated with it. You cannot record task logs against a dynamic task.



Take care if you are converting a pre-existing task to a dynamic task. If there are any task logs associated with it you may lose those records.

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Adding / Editing Tasks

Tasks are created from within the main project display screen and from other task detail displays.

You can also edit the details of a task by choosing the Crumb "edit this task" whenever it is available or clicking on the pencil icon (normally to the left of the task name) in many displays such as the Today Listing, todo, a project listing and so on.

Creating or editing pre-existing tasks is basically the same function so we have outlined both below. When you click on the New Task button or select an existing task to edit, dotProject will display a form that you can complete.

The screenshot shows the 'Add Task' interface in dotProject. At the top, there's a toolbar with standard browser buttons like Back, Forward, Stop, and Refresh. Below the toolbar is a menu bar with File, Edit, View, Go, Bookmarks, Tools, and Help. A sub-menu for 'Companies' is open. On the right side of the header, there's a logo for 'dotProject.net FREE SOFTWARE' and a 'New Item' button. The main content area has a title 'Project: Timesheet Development'. Below it, there's a form with fields for 'Task Name *' (a required field), 'Status' (set to 'Active'), 'Priority' (set to 'normal'), 'Progress' (set to 0%), and a 'Milestone?' checkbox. There are 'cancel' and 'save' buttons at the bottom right. Below the main form, there's a tabbed section with tabs for 'Details', 'Dates', 'Dependencies', 'Human Resources', and 'Other resources'. The 'Details' tab is selected. It contains fields for 'Task Owner' (set to 'Manager, Project'), 'Access' (set to 'Public'), 'Web Address', 'Task Type' (set to 'Unknown'), 'Select contacts...', 'Departments' (listing 'Human Resources Department', 'Finance Department', and 'Marketing Department'), 'Task Parent' (set to 'Timesheet Access and Permissions'), and 'Target Budget' (a text input field). To the right of these fields is a large 'Description:' text area. At the very bottom of the form, there's a 'Done' button.

The form is divided up into a header section and then a series of tabs that divide up the rest of the required data. As with projects, many of these fields have a direct impact on the workings of dotProject so we are going to provide a detailed outline of them.

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Starting with the task header:

Task Name	This is the name that will be displayed on team member todo / today listings and throughout the project. You should try to develop a task name which firstly distinguishes this task clearly from others and also provides a quick visual reference to the requirements.
Status	<ul style="list-style-type: none">➤ Set to active to include the task in all today and todo listings.➤ Inactive still contributes to project hours etc but will be displayed on Project Inactive Tasks tab and only in the today / todo listings if the option is selected at the top of the listing.
Progress	This field indicates the % complete for the task. If you are editing an existing task then this % complete will be automatically set based on any task log entries team members may have made. Alternatively you can choose to update the % here.
Milestone	Tick on if the current task is a milestone. Please see the Glossary for details of what a milestone is.

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Details Tab

The details tab contains the remaining basic project information:

The screenshot shows the 'Details' tab of the dotProject interface. At the top, there is a tabs bar with 'tabbed : flat' and tabs for 'Details', 'Dates', 'Dependencies', 'Human Resources', and 'Other resources'. The 'Details' tab is currently selected. Below the tabs, there are several input fields and dropdown menus:

- Task Owner:** Manager, Project (dropdown menu)
- Access:** Public (dropdown menu)
- Web Address:** [text input field]
- Task Type:** Unknown (dropdown menu)
- Select contacts...** (button)
- Departments:** Human Resources Department, Finance Department, Marketing Department (list box)
- Task Parent:** None (dropdown menu)
- Target Budget:** [text input field]
- Description:** [large text area]

Task Owner	The name of the task creator as set during entry - will default to the current user.
Access	<p>This field provides some security / permissions over and above those provided by user roles.</p> <ul style="list-style-type: none">➤ Set to Public, and the task is accessible by all users with access to this project;➤ Set to Protected and the task is accessible if the user is on the assigned / human resources list for the task and that user belongs to the same company as the Task Owner;➤ Set to Participant and the task is accessible to assignees only;➤ Set to Private and the task is only accessible by the Task Owner.

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Web Address	This field can be used to provide a web address / URL that the task relates to - it could be a page of documentation / a demonstration / a client's site or any other internal reference.
Task Parent	A drop down box that allows you to select the parent for the current task being created / edited. Should automatically default to the displayed task when a new task was generated. In other words, if you display a previously created dynamic task on the screen and then choose the New Task button, dotProject will automatically set the Task Parent.
Task Type	As with Projects themselves, task types is an optional categorisation field for tasks. At the moment type is not available as a filter.
Select Contacts	Again, as with Projects, you can assign Contacts at the task level. Rather than repeat the specific instructions on how to do this, the function works identically to that of adding Project Contacts. Any task level contacts added are displayed in the main Task Detail display screen and not reflected at the project level.
Departments	Also, as with Projects, you can assign Departments at the task level. Rather than repeat the specific instructions on how to do this, the function works identically to that of adding Project Contacts. Any task level departments added are displayed in the main Task Detail display screen and not reflected at the project level.
Target Budget	Task budget field - currently not used in any calculations but could be used to store the target budget for this task if required.
Description	Used to provide a detailed description of the task. Will be displayed when a user "hovers" on the task name.

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Dates

The dates tab groups together most of the date / time setting options. This tab also includes details of the sites settings for daily working hours and working days.

The screenshot shows the 'Dates' tab selected in a tabbed interface. The tab bar includes 'Details', 'Dates' (selected), 'Dependencies', 'Human Resources', and 'Other resources'. The main area contains fields for Start Date (10/08/2005), Start Time (4 : 00 pm), Finish Date, Finish Time (5 : 00 pm), Expected Duration (1 hours), and a 'Calculate' button. To the right, it displays Daily Working Hours: 8.0 and Working Days: Mon, Tue, Wed, Thu, Fri.

Start Date and Time	Date and time for the task to commence
Finish Date and Time	Date and time for the task to be completed
Expected Duration	Number and unit of expected duration for the task

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Calculate - Duration / Finish Date

Options to generate the duration based on the start / end date and times or the finish date based on the duration and the start date and time.

- Click on the Finish Date box to calculate the finish date field based on the start date / time + the expected duration (allowing with some limitations for the daily working hours / working days).. If you don't have a start date/time set then you will get an odd date in the finish date if you attempt to use this function.
- Click on the Duration option to calculate the duration field based on the start and end dates and times set. If you do not have either of these options set accurately then you could end up with an odd figure in the duration field.

As of the next major dotProject release we are starting work on a lot of infrastructure to enable us to be more reliably able to calculate these types of dates, based on the resources assigned and their availability. The current functionality is limited, but can be useful.

Dependencies

Dependencies are a work in progress and as of release 2.x are still only partially functional. They are targeted for more work as part of upcoming releases. Currently we only support a very limited subset of the Finish to Start dependencies in that they currently work for two task relationships. For example:

Task Number 1 - start date / finish date set up as well as resources allocated.

Task Number 2 - can add dates as a preliminary point if required (if we use them we tend to opt for a start / end date combination that is well in the future). On the Dependencies tab we turn on Dependency Tracking, turn on Set task start date based on dependency and then select Task Number 1 as the master task.

Then, when task Number 1 is set to 100% completed, dotProject will automatically set the start date of task number 2 to match the finish date of Task Number 1.

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Task Dependencies: Known Limitations

If task number 1 is re-opened then the dates on Task Number 2 are not reset automatically, although they are reset when Task Number 1 is again set to 100%.

Any tasks dependent on Task Number 2 are automatically calculated at the same time as Task Number 1 is set to 100% (so you get a "closing up" of the task list as soon as the first job is completed). The only way around that is that if you have a task with a dependency set, it cannot have other tasks dependent on it at present.

The date nominated for the start date for task number 2 is based on the working calendar and does not take any other activity that the resource has assigned to them into account.

The dependencies tab contains the following information:

The screenshot shows the 'Dependencies' tab selected in a tabbed interface. The 'Dependency Tracking' section has 'Off' selected. The 'All Tasks' and 'Task Dependencies' panes are empty. A checkbox for 'Set task start date based on dependency' is unchecked.

Dependency
Tracking - on / off

Select the option required to either use dependency tracking or not

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Dynamic Task	If this option is turned on then the task is regarded as firstly a parent task and secondly dynamic meaning that it will take it's duration and start and end date based on the values of child tasks
Do not track this task	Regardless of any dependencies that are set - turning this on will drop the task from the dependency set.
Task Dependencies	Select the task that the current task will be dependent upon
Set task start date based on dependency	If you leave this turned off then the only time that a task start date will be recalculated to match it's precedent task will be when that precedent task is marked as completed AND it's end date is reset as part of the task log. Currently there is a known bug in that the tick does not remain displayed if you re-edit the task. We will not be resolving that immediately as this entire area is due for considerable rework in the next dotProject Major release.
All Tasks / Task Dependencies	Using the arrows and highlighting the tasks you can move the tasks that you wish to have as dependent tasks to the from All Tasks to Task Dependencies (or back again to remove the dependency)
Set task start date based on dependency	Turn this option on if you wish to have the task start date re-calculated based on the completion date of the dependent task - but remember that this recalculation will only occur at the time that the first task in the dependency chain is saved / altered). Further to this, this area is still a work in progress and we would strongly suggest that you do not rely on it.



If you do not set an end date on a task this can result in that task not being displayed in today and todo listings automatically.

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Human Resources

The human resources tab contains the following information:

The screenshot shows the 'Human Resources' tab selected in a tabbed interface. The tab bar includes 'Details', 'Dates', 'Dependencies', 'Human Resources' (selected), and 'Other resources'. Below the tabs, there are three main sections: 'Human Resources' containing a list of users, 'Assigned to Task' showing a user assigned to a task, and 'Additional Email Comments' with a checkbox for notifications.

tabbed : flat

Details Dates Dependencies Human Resources Other resources

Human Resources:

- Manager, Project
- Massoudy, Hassan
- User, Admin
- Worker, Project
- Worker2, Project
- Winter, Documentation

Assigned to Task:

Manager, Project [100%]

Additional Email Comments:

Notify Assignees of Task by Email

Resources / Assigned to	These boxes allow you to select users to assign to the task by highlighting the name and clicking on the arrow in the required direction.
Percentage	Directly under the resource assignment boxes is a % box - use this to select the percentage of a resources time that you wish to assign to a task BEFORE you do the assignment
Additional Email Comments	Enter any additional comments that you wish to send out when notifications of this task go to the assignees. The details you enter in this box will not be retained / stored against the task record.
Notify Assignees of Task by Email	This option is clicked on by default and will cause dotProject to automatically send notification of the new / updated task to all assignees EXCEPT if the assignee is the user making the changes - they will not receive an email notification by default.

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Other Resources

The other resources tab contains the following information:

The screenshot shows the 'Edit Task' dialog box. At the top, there are links for 'tasks list', 'view this project', and 'view this task'. Below that, the 'Project: Demo Project' is selected. The 'Task Name' field contains 'Task One'. On the right, there are dropdown menus for 'Status' (Active), 'Priority' (normal), and 'Progress' (0%). A checkbox for 'Milestone?' is unchecked. Below these fields, a note says '* indicates required field'. At the bottom right are 'cancel' and 'save' buttons.

tabbed : flat

Details | Dates | Dependencies | Human Resources | Other resources

Resources: Assigned to Task:

Equipment: Analyser
Venue: Room with a view

> 100% <

Resources	Lists all the available resources as added via non-human resources. For more details please refer to Non Human Resources section in this manual.
Assigned to Task	Lists the resources that have been assigned to this task.

Adding Files to Project Tasks

Files can be added via the following options:

- new item - > File
- Files Module > new file
- View Tasks screen > new file

On the right hand side of the screen you'll see a link "Attach a File". Click on that link and dotProject will display a form to allow you to attach a file. For more details please refer to the Adding Documents / Files section of this manual.

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Moving Tasks from One Project to Another

Moving a task from within the task module is actually a very simple operation. When you edit a task you will notice that there is a move option at the bottom of the main Default tab:

The screenshot shows the 'Edit Task' dialog box. At the top, it says 'Edit Task' with a puzzle piece icon. Below that is a toolbar with 'tasks list', 'view this project', and 'view this task'. The main area has a yellow header bar with 'Project: Demo Project'. On the left, there's a 'Task Name' field containing 'Task One'. On the right, there are 'Status' (Active), 'Priority' (normal), 'Progress' (0%), and 'Milestone?' checkboxes. Below the header, it says '* indicates required field'. The 'Details' tab is selected, showing fields for 'Task Owner' (User_Example), 'Access' (Public), 'Web Address', 'Task Parent' (MY PARENT), and a dropdown for 'Move this task (and its children), to project:' which currently has 'Demo Project' selected. To the right, there are sections for 'Task Type' (Unknown), 'Select contacts...', 'Departments' (Something, Another), and 'Target Budget' (\$0.00). There's also a large 'Description:' text area. At the bottom, there are 'cancel' and 'save' buttons.

If you select the destination project for this task from the drop-down, the task will be immediately moved to that new project as soon as you complete the action.

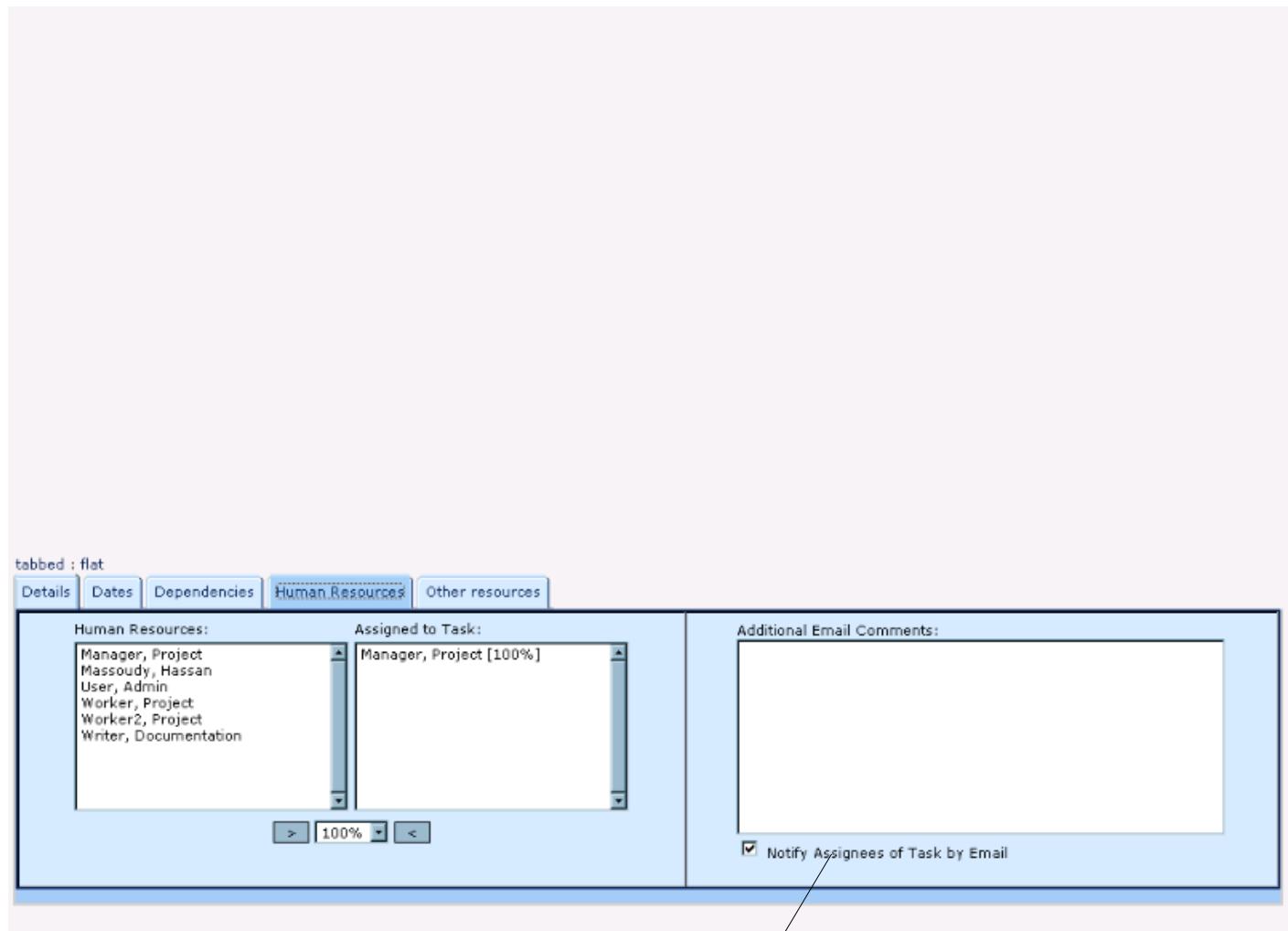
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Automatic Task Reminders and Updates via Email

Automatic Task Reminders and updates via email are available within dotProject. Updates have been sent by email for sometime now, automatic task reminders is incorporated in version 2.0.2.

Whenever a task is updated, a user is assigned to a task, a file added to a project or a task log incorporated there are options that the user can use to turn on / off task update notifications. Just to give you one example:



This option is turned on by default and notifications will be sent out unless the option is ticked off.

There are similar options in other screens, for example the New File screen.

Task logs have a slightly different set of options in relation to sending out task logs and we have addressed that in the section Day to Day System Usage.